

myVTax guide for Municipal Listers presented at 2018 TOEC

Navigating myVTax and the PTTR search

Presenters: Marylee Woods and Teri Gildersleeve

April 10, 2018

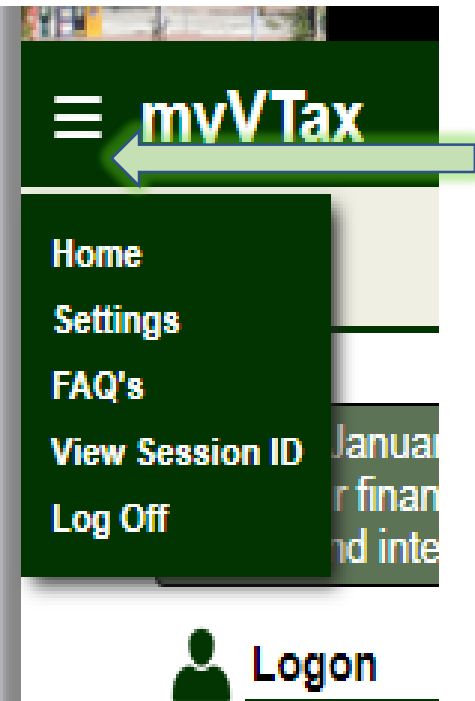
The Listers Homepage

The screenshot shows the myVTax homepage with several key features and annotations:

- myVTax Menu:** Located at the top left, indicated by a green box and an arrow pointing to the hamburger menu icon.
- Settings Menu:** Located at the top right, indicated by a green box and an arrow pointing to the gear icon.
- Alerts:** A central section with a green box and an arrow pointing to the "Alerts" tab. It shows a notification: "There is 1 unread message".
- Function Tabs:** A row of tabs below the alerts, including "PTTR Search", "Land Use Change Values", "Land Use Change Lien Releases", "Submissions", and "Correspondence". A green box labeled "Function Tabs" has arrows pointing to each of these tabs.
- "I want to" quick links:** A section on the right with a green box and an arrow pointing to it. It contains links: "Validate Sales for the Equalization Study", "Create Additional Username", and "Send us a message".
- Parameters:** A section at the bottom with a "Generate" button and input fields for "Town Name" (with a "Required" label) and "Date From" (with a "Required" label).
- Footer:** Includes links for "Accessibility Policy" and "Privacy Policy", and a copyright notice: "Copyright © 2015 State of Vermont. All rights reserved Vermont Department of Taxes".

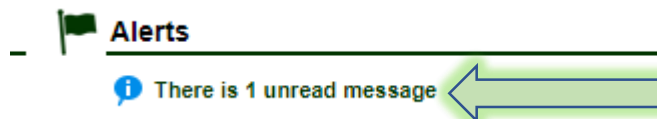
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The myVTax menu and Alerts



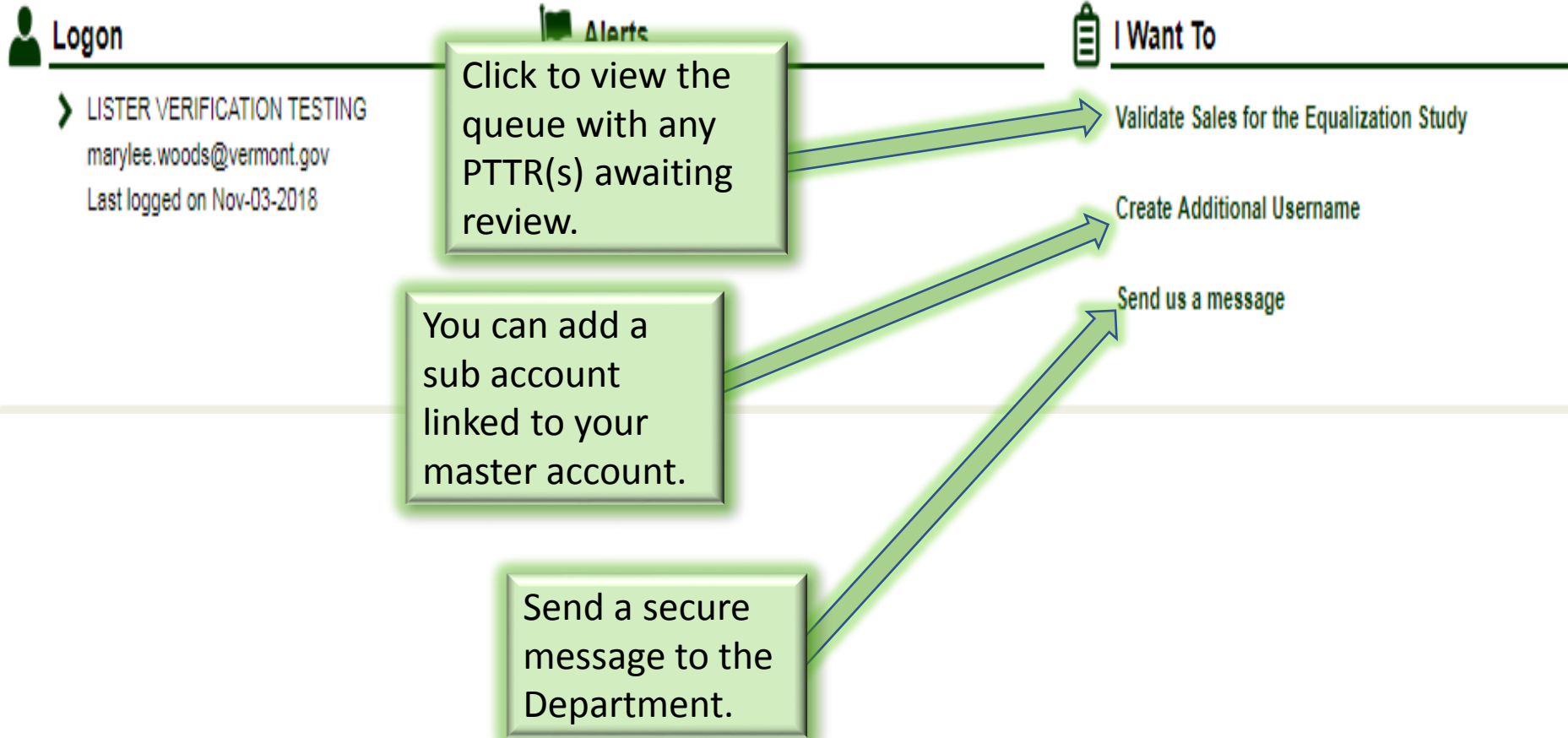
The **myVTax menu** is on every screen. Use it to access:

- Your home screen
- Your account settings
- Tax Department FAQ's
- Your session ID
- Or to log off



Alerts let you know if something needs attention. Click on the bold text hyperlink for easy access.

Lister home screen: I want to quick links



Session ID allows visual access to your myVTax screen only

The session ID allows a Department representative access to view **only** your current myVTax session, and see in real time what you see. We cannot see anything else on your screen or in your computer. This will help us guide you step by step through a process. Once you log out or navigate away from myVTax that session ID is no longer valid and you would need to get a new one. To retrieve your session ID, follow the steps below.

myVTax

Home
Settings
FAQ's
View Session ID
Log Off

- Click the **myVTax** menu.
- Click to choose **View Session ID**.

A box will pop up to ensure you are in contact with a myVTax support person, and that you may need to provide an ID. Click **YES**.

Get Support ID



If you are in contact with the myVTax support team, a representative may ask you to provide a support ID so they can view your session.

Do you want to get a support ID to allow the representative to view your session and provide assistance?

Yes

No

Your Support ID



Please provide this support ID to the Department representative.

Your support ID is: 230402

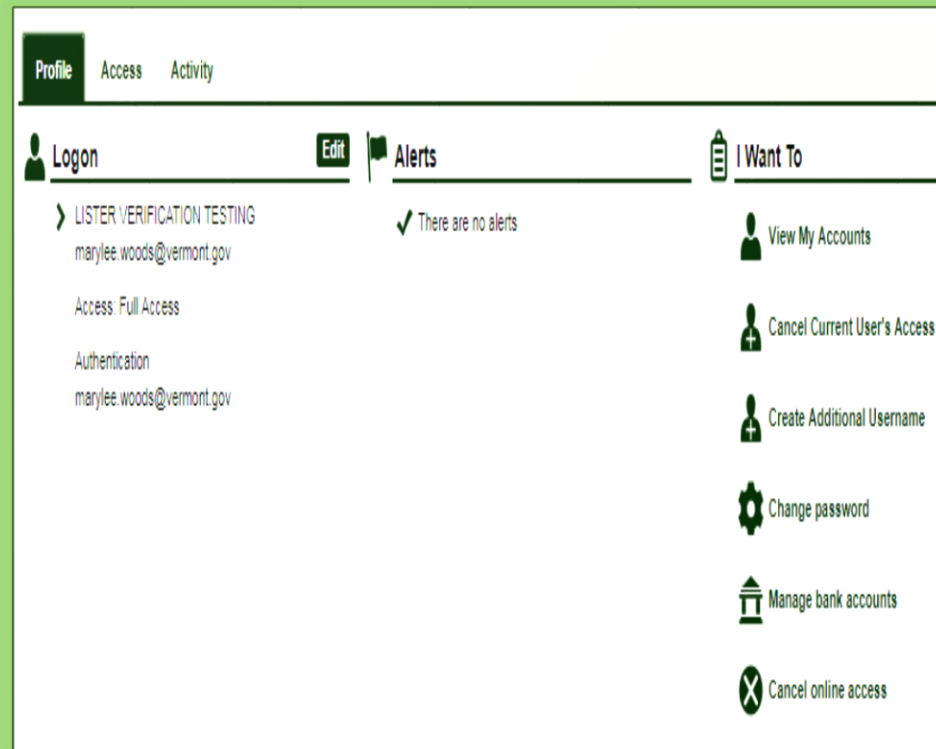
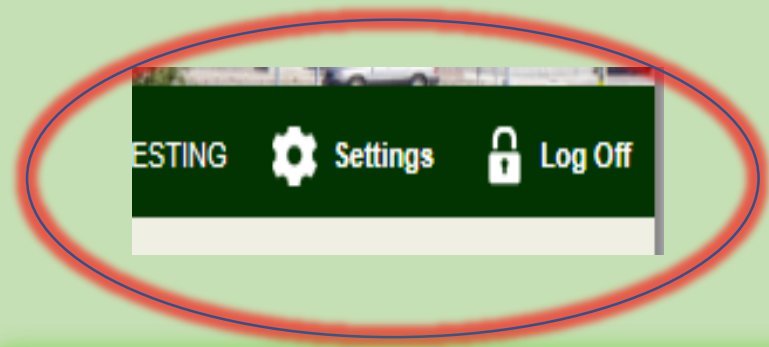
OK

A new box will pop up with your support ID, give this ID to the Department representative, then click **OK**.

The settings menu

The **settings menu** is located in the upper right corner on the myVTax home screen. Click the **settings menu** to open the screen displayed below with a different **I want to** menu with the following quick hyperlinks.

- **View My Accounts** allows you access to your tax accounts (personal income, business income, etc.) if linked to this myVTax account. Although Listers generally won't use this feature, we kept it as an option.
- **Cancel Current User's Access** allows you to immediately cancel online access for any of the subaccounts you created .
- **Create Additional Username** allows you to make subaccounts for other users. The subaccounts are linked to this master account. Some options are not available. Subaccounts will be cancelled if the master account is cancelled.
- **Change Password** allows you to change your sign-in password.
- **Manage bank accounts** is another feature most Listers won't use. Here you can save bank accounts for easy payment though ACH debit/credit.
- **Cancel online access** cancels the account you are currently signed into. Once you cancel the account you cannot reinstate it, and must contact the Department's IT helpdesk to set up a new one.



Property Transfer Tax Return (PTTR) Search

PTTR Search³⁹ Land Use Change Values Land Use Change Lien Releases Submissions Correspondence

Parameters Generate

PTT Parameters

Town Name SPAN
Date From Date To

Use the **dropdown box** to choose the town you want to look at.

Then click **generate** to get your results.

The PTTR search yields results of all electronically filed PTTRs submitted to Department by the Clerk

PTTR Search³⁹
Land Use Change Values
Land Use Change Lien Releases
Submissions
Correspondence

Parameters
Generate

PTT Parameters

Town Name
Addison
SPAN
003-001
Date From
Date To

PTTR Search
Filter

Verification Code	SPAN	Transferee Name	Transferor Name	City	Street	Grand List Category	Closing Date	Record Date
4y8thj	00300110817			Addison	3968 VT ROUTE 22A	12	Jan-19-2018	Jan-26-2018
5r56cj	00300110049			Addison	224 CEDAR DRIVE	01	May-05-2017	May-12-2017
kzgb7g	00300110872			Addison	VERMONT ROUTE 22A	12	Nov-06-2017	Nov-21-2017
b5dbdv	00300110760			Addison	6502 VERMONT ROUTE 125	01	Dec-15-2017	Dec-21-2017
4y99km	00300110462			Addison	425 PHEASANT RUN LANE	01	Nov-30-2017	Jan-05-2018
m88szz	00300110858			Addison	275 ATHERTON ROAD	15	May-19-2017	May-19-2017
ywjv8x	00300110543			Addison	492 TOWN HOUSE ROAD	04	Dec-19-2016	Jan-26-2017
jgxmmq	00300110478			Addison	352 STILLMEADOW LANE	15	Jul-03-2017	Jul-17-2017
d6cxvp	00300110136			Addison	912 GRANDEY ROAD	07	Aug-15-2017	Aug-18-2017
gyy86w	00300110262			Addison	4686 LAKE STREET	01	Dec-30-2016	Jan-23-2017
yw7qnw	00300110856			Addison	5551 VT ROUTE 22A	01	Apr-27-2017	May-01-2017
dcqnkf	00300110090			Addison	14 FISHER POINT ROAD SO	05	Sep-14-2017	Sep-18-2017
cnngth	00300110557			Addison	3250 TOWN LINE ROAD	02	Dec-12-2017	Dec-15-2017
yrbj9	00300110144			Addison	76 GRANDVIEW LANE	02	Aug-14-2017	Aug-18-2017
9338rr	00300110071			Addison	378 ELM POINT ROAD	05	Jul-28-2017	Aug-02-2017
shbwfv	00300110576			Addison	664 TRI-TOWN ROAD	01	Dec-21-2017	Jan-24-2018

Refine your results

PTTR Search⁹ Land Use Change Val Commissions Correspondence **Generate**

Parameters

PTT Parameters

Town Name SPAN Date From Date To **Filter**

Use **date fields** to view only returns recorded within a certain time frame.

PTTR Search

Verification Code	SPAN	Transferee Name	Transferor Name	City	Street	Grand List Category	Closing Date	Record Date
5r56cj	00300110049			Addison	224 CEDAR DRIVE	01	May-05-2017	May-12-2017
7qfy8h	00300111094			Addison	3313 ROUTE 17	02	Feb-21-2017	Feb-23-2017
j47b5d	00300199999			Addison	3640 VERMONT ROUTE 22A	02	Jan-30-2017	Feb-06-2017
m88szz	00300110858			Addison	275 ATHERTON ROAD	15	May-19-2017	May-19-2017
ywjv8x	00300110543			Addison	492 TOWN HOUSE ROAD	04	Dec-19-2016	Jan-26-2017
xxkrcx	00300110373			Addison	1008 NORTON TOWN ROAD	02	Jan-10-2017	Jan-13-2017
q5zgv	00300110293			Addison	3001 MIDDLE ROAD	15	Jan-19-2017	Jan-23-2017
gyy86w	00300110262			Addison	4698 LAKE STREET	01	Dec-30-2016	Jan-23-2017
yw7qnw	00300110858			Addison	5551 VT ROUTE 22A	01	Apr-27-2017	May-01-2017

9 Rows

Filter results using your own parameters

Parameters Generate

PTT Parameters

Town Name

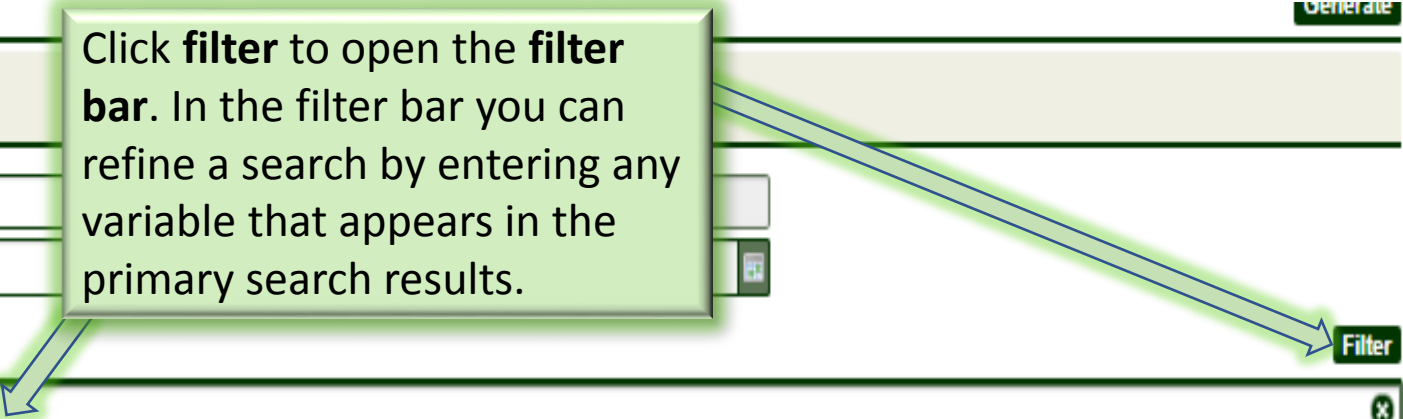
Date From

PTTR Search

×

Filter

Verification Code	SPAN	Transferee Name	Transferor Name	City	Street	Grand List Category	Closing Date	Record Date
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Click **filter** to open the **filter bar**. In the filter bar you can refine a search by entering any variable that appears in the primary search results.

Hint – you can search using any of the variables seen in the search results, but remember the filter will bring up any instance of the variable you enter. For example if you enter “smith” to look for Transferee Name results you will also yield results for a location of Smith Street, or a Transferor of Smith.

Example of filtered results

PTTR Search³⁹

Land Use Change Values

Land Use Change Lien Releases

Submissions

Correspondence

Parameters

Generate

PTT Parameters

Town Name

Addison

SPAN

003-001

Date From

Date To

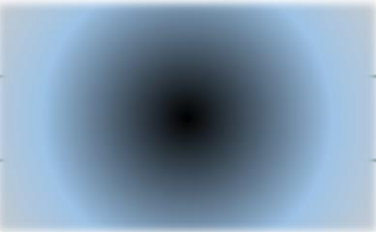
PTTR Search

Filter

Vermont Route

I typed "Vermont Route" and pressed **enter** on my keyboard.

x

Verification Code	SPAN	Transferee Name	Transferor Name	City	Street	Grand List Category	Closing Date	Record Date
kzgb7g	00300110872			Addison	VERMONT ROUTE 22A	12	Nov-06-2017	Nov-21-2017
b5dbdv	00300110760			Addison	6502 VERMONT ROUTE 125 01		Dec-15-2017	Dec-21-2017
j47b5d	00300199999			Addison	3640 VERMONT ROUTE 22A 02		Jan-30-2017	Feb-06-2017

3 Rows

My results were filtered to only contain results with "Vermont Route"



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You can sort by clicking any column header. In this example I clicked the Grand List Category.

PTTR Search Filter								
Verification Code	SPAN	Transferee Name	Transferor Name	City	Street	Grand List Category	Closing Date	Record Date
b5dbdv	00300110760			Addison	6502 VERMONT ROUTE 125	01	Dec-15-2017	Dec-21-2017
yw7qnw	00300110656			Addison	5551 VT ROUTE 22A	01	Apr-27-2017	May-01-2017
qhezjh	00300110262			Addison	4686 LAKE STREET	01	Apr-28-2017	Jun-26-2017
gyy86w	00300110262			Addison	4686 LAKE STREET	01	Dec-30-2016	Jan-23-2017
cy674m	00300110581			Addison	854 TRI-TOWN ROAD	01	Dec-19-2017	Dec-22-2017
4y99km	00300110462			Addison	425 PHEASANT RUN LANE	01	Nov-30-2017	Jan-05-2018
z89nzb	00300110004			Addison	217 ALGONQUIN DRIVE	01	Sep-28-2017	Oct-02-2017
5r56cj	00300110049			Addison	224 CEDAR DRIVE	01	May-06-2017	May-12-2017
shbwfv	00300110576			Addison	664 TRI-TOWN ROAD	01	Dec-21-2017	Jan-24-2018
9ccgkw	00300110576			Addison	664 TRI-TOWN ROAD	01	Jan-16-2018	Jan-24-2018
78b7kn	00300110664			Addison	6211 VT ROUTE 22A	01	Aug-01-2017	Aug-07-2017
2qbsr2	00300110845			Addison	196 WHITFORD ROAD	01	Jul-14-2017	Jul-19-2017
3x7sgr	00300110102			Addison	208 GAGE ROAD	02	Dec-07-2017	Jan-29-2018
9n69hx	00300110192			Addison	1603 JERSEY STREET SOUTH	02	Jul-26-2017	Jul-31-2017
cnngth	00300110557			Addison	3250 TOWN LINE ROAD	02	Dec-12-2017	Dec-15-2017
j7h22j	00300110813			Addison	7214 VT RTE 17 W	02	Jun-16-2017	Jun-21-2017
yrbjf9	00300110144			Addison	76 GRANDVIEW LANE	02	Aug-14-2017	Aug-18-2017
xxkrcx	00300110373			Addison	1006 NORTON TOWN ROAD	02	Jan-10-2017	Jan-13-2017
q5tsr4	00300110101			Addison	114 GAGE ROAD	02	Jun-19-2017	Jun-26-2017
csgnzz	00300110868			Addison	1844 TOWN LINE ROAD	02	Aug-11-2017	Sep-07-2017
j47b5d	00300199999			Addison	3640 VERMONT ROUTE 22A	02	Jan-30-2017	Feb-06-2017
7qfy8h	00300111094			Addison	3313 ROUTE 17	02	Feb-21-2017	Feb-23-2017
kf4swb	00300110836			Addison	54 WHITNEY CREEK ROAD	02	Oct-06-2017	Oct-10-2017
yy3pjb	00300111044			Addison	107 STONEHOUSE ROAD NORTH	02	May-26-2017	Jun-01-2017
ywjv8x	00300110543			Addison	492 TOWN HOUSE ROAD	04	Dec-19-2016	Jan-26-2017

Hold CTRL on your keyboard, and click a second header to do a secondary sort. It is still sorted by category, but now also by closing date.

Date From: Date To:

PTTR Search Filter


Verification Code	SPAN	Transferee Name	Transferor Name	City	Street	Grand List Category	Closing Date	Record Date
gyy86w	00300110262	[REDACTED]	[REDACTED]	K Addison	4686 LAKE STREET	01	Dec-30-2016	Jan-23-2017
yw7qnw	00300110656			Addison	5551 VT ROUTE 22A	01	Apr-27-2017	May-01-2017
qhczhj	00300110262			K Addison	4686 LAKE STREET	01	Apr-28-2017	Jun-26-2017
5r56cj	00300110049			Addison	224 CEDAR DRIVE	01	May-06-2017	May-12-2017
2qbsr2	00300110845			Addison	196 WHITFORD ROAD	01	Jul-14-2017	Jul-19-2017
78b7kn	00300110664			Addison	6211 VT ROUTE 22A	01	Aug-01-2017	Aug-07-2017
z89nzb	00300110004			HT Addison	217 ALGONQUIN DRIVE	01	Sep-28-2017	Oct-02-2017
4y99km	00300110462			Addison	425 PHEASANT RUN LANE	01	Nov-30-2017	Jan-05-2018
b5dbdv	00300110760			Addison	6502 VERMONT ROUTE 125	01	Dec-15-2017	Dec-21-2017
cy674m	00300110581			Addison	854 TRI-TOWN ROAD	01	Dec-19-2017	Dec-22-2017
shbwfv	00300110576			O Addison	664 TRI-TOWN ROAD	01	Dec-21-2017	Jan-24-2018
9ccgkw	00300110576			O Addison	664 TRI-TOWN ROAD	01	Jan-16-2018	Jan-24-2018
xxkrcx	00300110373			Addison	1006 NORTON TOWN ROAD	02	Jan-10-2017	Jan-13-2017
j47b5d	00300199999			Addison	3640 VERMONT ROUTE 22A	02	Jan-30-2017	Feb-06-2017
7qfy8h	00300111094			Addison	3313 ROUTE 17	02	Feb-21-2017	Feb-23-2017
yy3pjb	00300111044			Addison	107 STONEHOUSE ROAD N	02	May-26-2017	Jun-01-2017
j7h22j	00300110813			Addison	7214 VT RTE 17 W	02	Jun-16-2017	Jun-21-2017
q5tsr4	00300110101			Addison	114 GAGE ROAD	02	Jun-19-2017	Jun-26-2017
9n69hx	00300110192			Addison	1603 JERSEY STREET SOUTH	02	Jul-26-2017	Jul-31-2017
osgnzz	00300110868			Addison	1844 TOWN LINE ROAD	02	Aug-11-2017	Sep-07-2017
yrbjf9	00300110144			Addison	76 GRANDVIEW LANE	02	Aug-14-2017	Aug-18-2017
kf4swb	00300110836			Addison	54 WHITNEY CREEK ROAD	02	Oct-06-2017	Oct-10-2017
3x7sgr	00300110102			Addison	208 GAGE ROAD	02	Dec-07-2017	Jan-29-2018
cnngth	00300110557			Addison	3250 TOWN LINE ROAD	02	Dec-12-2017	Dec-15-2017
ywjv8x	00300110543			AI Addison	492 TOWN HOUSE ROAD	04	Dec-19-2016	Jan-26-2017
bqzgyt	00300110069			Addison	198 ELM POINT ROAD	05	Dec-16-2016	Dec-19-2016

General email for a myVTax notification

Thu 03/22/2018 3:29 PM

 TAX - myVTax Info <myVTaxInfo@vermont.gov>

Testing: VTS New Property Transaction(s) Available

To  Woods, Marylee

This is an automated message from the Vermont Department of Taxes regarding your myVTax account. Please do not respond to this email directly.

A Property Transfer Tax return has been submitted for one or more of the towns on which you are an assessor. Please sign into your myVTax account in order to complete your review for the Equalization Study.

Contact information:

Vermont Department of Taxes Call: (802) 828-6802

133 State Street

Or Email: [myVTax Support](#)

Montpelier, VT 05602-3667

When you have activity or there is a task needing your attention, myVTax will send you email notification at the email address used to set up your account. Because email is not secure, the email contains no details but lets you know to check out your myVTax account.

You will also get a message in your myVTax account

The screenshot displays the myVTax account interface. On the left, the 'Lagon' section shows the user's name 'Addison Listers', email 'marylee.woods@vermont.gov', phone '+1 (802) 759-2020', and last login 'Last logged on Mar-22-2018'. The 'Alerts' section, indicated by a flag icon, contains a red circle around the text 'There is 1 unread message'. A green callout box on the right explains: 'You can view a new message by clicking the bold hyperlink under your alerts or by clicking on the correspondence tab'. A blue arrow points from the callout to the alert message, and a green arrow points down to the 'Correspondence' tab in the navigation bar. The navigation bar includes 'PTTR Search⁰', 'Land Use Change Values', 'Land Use Change Lien Releases', 'Submissions', and 'Correspondence', with the last one circled in red. Below the navigation bar is the 'Parameters' section with a 'Generate' button. The 'PTT Parameters' sub-section is active, showing a 'Town Name' dropdown menu with 'Required' selected, a 'Date From' field, and a 'SPAN' section with 'Required Date To' and two empty input fields.

Lagon

Addison Listers
marylee.woods@vermont.gov
+1 (802) 759-2020
Last logged on Mar-22-2018

Alerts

There is 1 unread message

You can view a new message by clicking the bold hyperlink under your alerts or by clicking on the correspondence tab

PTTR Search⁰ Land Use Change Values Land Use Change Lien Releases Submissions **Correspondence**

Parameters Generate

PTT Parameters

Town Name SPAN
Date From Required Date To

Correspondence tab features

Clicking the **Correspondence** opens the message center, which resembles an email window. The **myVTax messaging center** is totally secure, and it keeps a history of all sent, received, and deleted messages. There are quick options to send a message or mark all as read. The filter function is available here too!

Send Message Mark All As Read

Posted	Subject	For	Id	Name	Period		
Mar-22-2018	New Property Transaction(s) Available					Mark As Read	Delete

To open your message click on the **Subject** link. To the right of the message you can also mark it as read, or delete it if you do not need to look at it.

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Opened message in myVTax

This is what myVTax messages look like when opened. There are quick **I want to** options within the message to reply securely to the Department, or to delete the message. You will see a full history of the original message and all replies just like your email messages.



Mess

Addison Listers
marylee.woods@vermont.gov

> Message



I Want To

Reply

Delete



Lister Verification for Equalization Study

Received: Thursday, Mar 22, 2018 3:29:26 PM
Subject: New Property Transaction(s) Available

A Property Transfer Tax return is ready for your review. You can access this return by clicking 'Enter values for the Lister Equalization Study' under the 'I Want To' panel.



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New Enhancements Coming Soon

- Better sorting variables in the Listers queue. No sort by first name.
- We will include the confirmation number associated with each PTTR reviewed as a column in your queue
- Export features will allow you to export PTTR search results, your work queue lists, etc.
- Reporting features will allow you to create a report to use to track your work
- Please send us a message from your myVTax account with feedback about usability or any issues you're having with this or any other myVTax process. We cannot guarantee to make everything happen, but we consider all input, and will not dismiss comments out of hand.

Thank you all for your continued support and feedback!
You are helping make the myVTax system a success.